Questions and Comments from Prospective Offerors for TSP Benchmarking Services, TIB-2013-RFP-0014

- 1. Can you please forward me the most recently approved Investment Policy Statement (IPS)? The Federal Employees' Retirement System Act (FERSA) serves as the Investment Policy Statement for the Thrift Savings Plan (TSP).
- 2. Can you please provide me a list of all vendors for the Plan? Relevant contracts are listed and described in Attachment 2, Section G of the RFP, sufficient for responding to the RFP.
- 3. Can you make available a recent reporting package for the Plan? See information published on the Agency's website at www.frtib.gov.
- 4. Can you provide an overview of the structure of the Plan? (i.e., number of Plans, investment vehicles (mutual funds or Commingled trusts), investment managers, fee structure) See information published on the Agency's website at www.frtib.gov, and in Attachment 2 of the RFP.
- 5. We assume the Contractor will have access to FRTIB's outsource vendors specifically to collect process, cost and driver data. Please confirm this assumption. Yes, the Contractor will have access to the Agency's vendors that perform work associated with the key operational processes of the TSP, through appropriate Agency resources. Non-disclosure information must be provided, as addressed in RFP Section H.2.4 and RFP Attachment 3.
- 6. Will FRTIB consider requesting an Organizational Conflict of Interest (OCI) mitigation plan to allow Offerors an opportunity to mitigate possible future conflicts? (Reference: H.2.1) Yes, added as Section H.2.5 and included in Amendment 00002, dated August 29, 2013.
- 7. Please confirm that an Offeror is to submit its pricing using the Estimated Hours, by Labor Category as shown in the tables contained in Section B.4 of the RFP versus providing Estimated Hours by Labor Category to accomplish the four benchmarking tasks defined in Section C. (*Reference: Sections L.4.2.3.3 & L.4.4*) Yes.
- 8. Who currently provides benchmarking services? Is their contract expiring? Why search now? No one is currently providing benchmarking services. Benchmarking will give us greater situational awareness and inform our efforts to continuously assess and improve our performance.
- 9. Will the incumbent be invited to rebid? N/A
- 10. How much in assets is in the plan? \$369 Billion as of month-end July 2013; see; RFP Attachment 2.

- 11. How many participants are in the plan? 4.6 million participants; see RFP Attachment 2.
- 12. Are you working with a consultant on the search? If so, who? We are not working with a consultant on the search.
- 13. Who provides recordkeeping services for the plan? SERCO currently provides recordkeeping services.
- 14. Any other changes to the plan happening soon? FRTIB awarded its
 Technology and Enterprise Support Services (TESS) contract to SAIC earlier
 this month, so SAIC will be the new recordkeeper beginning in February 2014.